CCH® ProSystem *fx*® Scan

Welcome to CCH ProSystem *fx* Scan v16.0

This bulletin provides important information about Scan v16.0. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

CCH® ProSystem *fx*® Funnel
Funnel, which installs with Scan Administrator and Workstation, replaces the "print-then-scan" manual workflow you might have used to handle digital files received by your clients. The Funnel can improve your workflow and helps you retain the benefits of receiving digital files. The Funnel allows you to:

- Collect and assemble digital files in a single location, regardless of source, including scanned images, TIF/TIFF, JPG/JPEG, BMP, PNG, GIF, PDF, TXT, RTF, DOC/DOCX, XLS/XLSX, and ZIP.

- Add a cover page and target sheets (including Force Specific Classification target sheets) to your digital collection of workpapers through a right-click or menu action.

- Bypass editing restrictions on protected PDF files to include the source file without extra steps.

  Note: The Funnel does not bypass PDF open file passwords. If a file requires a password to open it, the best practice is to remove the open file password before adding it to Funnel.

- Launch the Import Assistant to automatically transfer the file directly to a Scan Import folder of your choice.

See the knowledge base article Overview of Using CCH® ProSystem *fx*® Funnel to view a video about using Funnel.

Batch Operations
Batch Operations allow you to select multiple jobs to perform the Skip AutoFlow or Delete operation in a batch mode. From Scan Administrator or Workstation, go to File > Batch Operations to initiate this process.

Skip AutoFlow and Delete Files
This feature is only available from Scan Administrator. Jobs in a "Ready for AutoFlow" status can now be deleted. Behind the scenes, AutoFlow is skipped, and the resulting files are deleted.

Jobs Processed Using Document Routing Slips
The Document Routing Slips have been modified to now include the Client ID, in addition to the Document ID, thus enabling you to clearly identify jobs more easily in Scan queues.

Scan Workstation and Major Version Updates
Scan Workstation now checks its version against Scan Administrator's version to verify the workstation is up-to-date. A message displays when they are not on the same version.

Note: This feature will be available when Scan Workstation v16 is installed for future Scan releases.

Error Jobs
In the Job Queue, jobs that have errors now display a link that opens a knowledge base article with information about the error. The information in the article includes the error code, a description of the issue, and any recommended actions to resolve the error.

Issuer Information for New Forms
Regardless of the AutoFlow Setting in Scan Administrator, AutoFlow now always imports issuer information when importing forms flagged as "Import New" to save time and effort. Forms flagged as Import New create a new input form in Tax where issuer information is not yet present.

AutoFlow Diagnostics
The Missing Forms tab in the AutoFlow Diagnostics now includes a column for Account Number for missing forms when that field is present in Tax.

AutoFlow Wizard
When the AutoFlow Wizard window is maximized, it now retains its maximized state the next time the AutoFlow Wizard is launched.

Skip Form 1099-MISC
The option to always skip Form 1099-MISC has been added as a global firm option in Scan Administrator. When enabled, Form 1099-MISC is marked as skipped by default. Form 1099-MISC, however, can be autoflowed on a return-by-return basis.

Additional Forms & Fields
The following fields for each form now extract:

- Form W-2C (corrected W-2) (Note: Form W-2C autoflows to Form W-2)

- Form 1098 (MIS) – Borrower's Address

- Form 1099-DIV – Box 9 (Cash Liquidation Distributions) and Box 10 (Noncash Liquidation Distributions)

- Form 1099-R – Box 2b (Total Distribution)

Help Menu
The Help menu in Scan Administrator now contains the option to start a remote support session when needed during a call to our technical support team.

Adobe® Acrobat® Support
The ability to install PDFlyer v16 for use with Adobe® Acrobat® XI is discontinued. Adobe® Acrobat® DC, for both the Continuous and Classic tracks, continues to be supported.

Known Issues

We have addressed a PDFlyer issue to ensure that the format is maintained when default text is removed from a Sticky Note.

Installing Scan

Online Software Delivery
We deliver all software exclusively through downloads. For more information on online software delivery, including FAQs and system requirements, please visit https://support.cch.com/Online-Software-Delivery.

Catalog updates are available via the Scan Support Web site or through automatic updates in Scan Administrator. They are delivered weekly, as needed, from January through April 15. Our policy is to support forms for the current tax year and the two prior tax years immediately preceding it. This policy ensures accuracy and minimizes catalog size and download times.

Please refer to the Scan system requirements page on CCH Support Online for additional information.

Installing Scan Administrator

If you are updating from a previous version of Scan, the installation automatically detects a previous version of Scan and removes it.

Note: Scan is memory and CPU intensive. We recommend that you do not install Scan on a server or workstation that houses other critical applications, as it will degrade the performance of the other applications. Scan can be installed on a high-end workstation, if necessary, to avoid this issue. Import, export, and archive folders can be located on a separate server or file share.

Microsoft® .NET Framework 4.6.1 must be installed on the server or dedicated workstation running Scan Administrator. If you have not already installed .NET Framework 4.6.1, it is installed for you during the installation process.

The following steps guide you through installation of the Scan Administrator program files if you do not use a Scaled Server installation. If you use a Scaled Server installation, please contact Customer Support at 1-800-PFX-9998 (1-800-739-9998) for assistance.

1. Log in to the server or dedicated workstation where you plan to install Scan v16.0. Verify that your account has Administrator rights.

2. Download and launch **prosystem_fx_scan_16.0.0.3.exe**.

3. Click **Next**.

4. Review the License Agreement.

5. Click **I Agree**.

6. If needed, change the destination folder where Scan should be installed by clicking **Browse** and navigating to or entering a new location. The default import, archive, and export folders are added to the Scan shared folder as part of the installation process.

7. Click **Install**. Wait for the installation to complete.

8. Select the permission key option for this installation.

9. Click **Next**.

10. Click **Finish**.

Installing Scan Workstation

If you are updating from a previous version of Scan Workstation, the installation automatically detects the previous version of Scan Workstation and removes it.

Microsoft® .NET Framework 4.6.1 must be installed on each workstation running Scan Workstation. If you have not already installed .NET Framework 4.6.1, it is installed for you during the installation.

To install the Scan Workstation program files, do the following:

1. Browse to **\\<computer name>\Workstation**.

2. Launch **ProSystem fx Scan Workstation.exe**.

3. Click **Next**.

4. Review the License Agreement.

5. Click **I Agree**.

6. If needed, change the destination folder where Scan Workstation should be installed by clicking **Browse** and navigating to or entering a new location.

7. Enter the Scan Main Server Machine Name where Scan Administrator is installed.

8. Click **Next**.

9. Click **Install**. Wait for the installation to complete.

10. Click **Finish**.

Installing PDFlyer

Install PDFlyer on workstations licensed for Adobe® Acrobat® DC (Continuous and Classic tracks). PDFlyer will not run with Adobe® Reader®.

Microsoft® .NET Framework 4.6.1 must be installed on each workstation running PDFlyer. If you have not already installed .NET Framework 4.6.1, it is installed for you during the installation.

To install the PDFlyer program files, do the following:

1. Browse to **\\<computer name>\Workstation**.

2. Launch **ProSystem fx PDFlyer.exe**.

3. Click **Next**.

4. Review the License Agreement.

5. Click **I Agree**.

6. If needed, change the destination folder where PDFlyer should be installed by clicking **Browse** and navigating to or entering a new location.

7. Click **Install**. Wait for the installation to complete.

8. Click **Finish**.